



# Legacy Circle

An invitation to make an impact on the  
future of health care in our community



# A Better Way for Future Generations

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Is it too ambitious to dream that South Central Pennsylvania could have the best behavioral health care in the nation? WellSpan Philhaven believes we can. Imagine a community where every adult, adolescent and teenager could have their behavioral health care needs expertly met. Where all our energies in the community are focused on providing productive events and developing healthy relationships.

A growing number of people in our community are partnering with WellSpan Philhaven to help us move our community toward this level of wellness.

**The Legacy Circle** honors a group of WellSpan Philhaven supporters who demonstrate a special commitment to the future of our mission. Through gift planning to WellSpan Philhaven, these supporters help to ensure a continuing

legacy of finding a better way to nurture mental health and resilience for generations to come.

***Would you consider joining this special Legacy Circle by including WellSpan Philhaven in your legacy plans?***

By partnering with WellSpan Philhaven, you can leave a legacy that will impact our children, grandchildren and future generations.

This booklet was developed to share the mission and impact of WellSpan Philhaven and to invite you to become a part of our purpose and promise to make a difference in our community. Please take a few minutes to think about your legacy and consider some giving opportunities that best fit with your ideals.

There are a number of ways you can join others in leaving a legacy. Some are very simple. Others are more complex. But the bottom line is that there is a way to meet your needs and wishes for family and charitable causes.

We will be happy to learn more about your legacy goals and discuss whether WellSpan Philhaven can help you achieve them. Along with your financial and legal advisors, we can help to identify options for your consideration.

We welcome the opportunity to be part of this journey with you.

Sincerely,

***Jim Shenk, MA, CAP, CFRE***  
*Director of Development*

# What are Your Dreams?

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WellSpan Philhaven has many dreams for improving behavioral health care in our community. But when thinking about your legacy, it is more important to start with your dreams, your values and what is important to you.

***Do you dream of a time when no adult needs to suffer mental illness in silence?***

***When all children with autism can thrive in a mainstreamed classroom?***

***When all teenagers and college students have the resilience and support needed to weather times of depression?***

WellSpan Philhaven cares for children, teens, adults and seniors struggling with mental health issues and substance abuse. We are in the community raising awareness about mental health wellness and suicide prevention, and are committed to wellness for everyone in our community.

## **Are these issues important to you? Then let's talk.**

Our commitment is to work with you to discover if there is a mutually beneficial way to create your legacy, one that has meaning for you:

- An unrestricted gift which provides WellSpan Philhaven the freedom to use your eventual gift for the most important needs when received.
- A restricted gift that allows you to direct your gift to a specific purpose.
- Endowed funds which generate income annually in perpetuity for our mission, for restricted or unrestricted purposes.

***Note:*** *Please discuss your gift intention with our office to ensure that we understand your wishes and can carry them out. We can help you with the appropriate language.*



# Your Invitation to Become Part of a Legacy Circle

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The Legacy Circle celebrates donors who support the future of WellSpan Philhaven with a gift from their estate or a life income gift. We invite you to use this booklet to learn about opportunities that might fit your legacy goals and financial plans. You'll also see stories about why other donors made the decision to join the vital group of Legacy Circle members.

## Members of the Legacy Circle Receive:

- The satisfaction of promoting hope, healing and wholeness today and for future generations
- A special listing in WellSpan Philhaven's recognition of donors
- Invitations to special events
- Recognition as members of a special group of WellSpan Philhaven supporters

The Legacy Circle was established in honor of the late Victor F. and Edith

Weaver. Well-known as the entrepreneurs of Victor F. Weaver, Inc., a large New Holland poultry processing plant, these active church members lived out their faith personally and professionally.

Mr. Weaver, a founding and prominent member of the Philhaven Board of Directors, led an ambitious building program to substantially increase the size of WellSpan Philhaven's main facility in Mt. Gretna. Additionally, Mrs. Weaver began a ministry of knitting blankets to comfort those receiving inpatient care under our roof.



The Weavers gave generously to Philhaven's annual appeal and funded the pavilion on campus. They also made provisions to leave a legacy beyond their lifetimes, including a major gift to Philhaven from a trust fund. Likewise, the Foundation they created has provided for a major multi-year project to strengthen marriages and families. Victor and Edith Weaver's model of love and generosity continues to serve as an inspiration today.

*Your stated intention to make a Planned Gift for WellSpan Philhaven qualifies you for membership in our Legacy Circle. Your recognition is not based on a specific gift amount.*

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**100% of your gift will go toward the program or service you designate.**

# “ We Give to Honor Family



E. Glenn and Vera Nauman have been ardent supporters of WellSpan Philhaven. Glenn's roots with Philhaven go back to the 1950s, when his mother was hospitalized several times after the death of his father. The help his mother received for some emotional issues gave Glenn a great appreciation for Philhaven during a very difficult time.

“It's so good to have a place like this in the area for those who need behavioral

health care. The committed staff and the excellent way the organization is run give Vera and me even more reason to offer our financial support.”

In addition to being strong annual supporters, the Naumans have included a generous gift for WellSpan Philhaven in their will. Glenn has also been a key organizer of the annual Glenda Nauman Breneman Memorial Philhaven Golf Classic, which honors their daughter and has been held in Sarasota, Florida for 30 years. A portion of the funds generated have been invested and will add approximately \$400,000 to the WellSpan Philhaven Endowment, generating nearly \$20,000 in perpetuity to help treat and provide resources for patients without the means to pay.

Glenn and Vera's generosity is creating a legacy that will continue to help people for generations to come.

## Be efficient with your taxes.

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Planned Giving tools offer a number of ways to be tax-efficient with your assets and financial planning. Gifts may allow for immediate tax deductions, a reduction of capital gains taxes when applicable, and ways for beneficiaries like heirs and non-profits to make the most of the gifts received. By planning your charitable giving, you can make your dollars go further than by simply writing a check. It's called good stewardship! Talk with a trusted advisor. We can help.



# Some of the Easiest Ways to Make an Impact

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## Bequests

A bequest is the most common way of leaving a legacy. A bequest is a gift of cash, securities or other property designated via an estate plan.

- Make a bequest to WellSpan Philhaven in your will or trust (a specific dollar amount or asset, a percentage of your estate, or a gift of the balance of your estate);
- Leave all or part of your retirement assets to WellSpan Philhaven; or
- Name WellSpan Philhaven as owner or beneficiary of a life insurance policy.

## Change of Beneficiary Form

Filling out a “Change of Beneficiary Form” for a retirement account or life insurance policy is a simple process, not requiring changes to your will or trust. More importantly, retirement plans (IRA, 401k, 403b, pension or other deferred

plans) are often the largest assets in your estate – and the most heavily taxed. If you leave these funds to someone other than a spouse, a large portion of these assets might be lost. Simply complete a change of beneficiary form to leave all or a portion of the plan to WellSpan Philhaven. WellSpan Philhaven gets the full value of these funds.

## Gifts from your IRA

You do not need to delay a gift from your IRA. The now-permanent Charitable IRA Rollover allows you to satisfy your required minimum distribution, substantially reduce taxable income and support WellSpan Philhaven. If you are over age 70½, you can donate up to \$100,000 from your IRA to WellSpan Philhaven, avoiding any federal income tax on these funds. Our office can assist you with language for requesting your fund administrator to effect this donation.

## Transfer of Other Assets

Common bank accounts (i.e., checking, savings and money market accounts) can be transferred to a beneficiary by completing a “**payable on death**” (POD) form. This allows assets to transfer outside the probate process.

A similar method using a “**transfer on death**” (TOD) form is typically used for stocks, bonds, brokerage accounts, mutual funds and real estate.

## Life Insurance

A gift of life insurance to WellSpan Philhaven is a great way to establish a legacy. There are several options:

- Donate a paid-up policy that you do not need as an immediate gift;
- Change the beneficiary designation of a current policy for a future gift to WellSpan Philhaven; or
- Purchase a new policy and name WellSpan Philhaven as owner and beneficiary.

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## We Give to Support Innovation



Nancy Brinser, an award-winning seamstress, and her husband Jerry, an attorney and Philhaven counsel for 30 years, know a lot of people who have benefited from WellSpan Philhaven services. Jerry notes that they “also like how WellSpan Philhaven changes with the times. If there’s a new program that will help more people, they will do it, instead of being stuck in the same old way of doing things.”

Many years ago, Jerry and Nancy took out a life insurance policy and named Philhaven as a beneficiary. “This was an opportunity to donate when we weren’t in a position to give large sums. We found it a way to give a larger legacy than we could have otherwise. It’s also a way to give even after we’re no longer here.” With four children and seven grandchildren, the Brinsers are leaving a legacy for them and many others.

## You Might want to Consider Gifting these Assets:



### Real Estate

A gift of your appreciated property – such as your home, vacation property, vacant land, farmland or commercial property – may be an ideal way for you to leave a lasting legacy.



### Private Business Interests

Donating appreciated stock or bonds is a common and easy way to benefit our mission. It is also possible to donate all or a portion of privately held business interests. This takes more discussion with and assistance from relevant financial and legal professionals. But yes, it is possible, and can make a wonderful gift!



### Farm Commodities

Make a gift of what you grow and harvest, from farm crops like grain to animal products like dairy, honey and more. You can deduct the cost of production from your taxes and you may qualify for other tax benefits as well. What a creative opportunity.



### Valuable Collections, Mineral Rights.

Where there’s a will, there’s a way! Let’s discuss!

## How it Works



① Gift of cash or securities



② Income tax deduction & fixed income



③ Remainder to a WellSpan hospital, facility, program or foundation

# Giving Back that Gives to You

## Charitable Gift Annuities

A Charitable Gift Annuity offers you steady payments for life with funds eventually going to WellSpan Philhaven. This can add an extra measure of financial security in your retirement.

You can use a range of assets (cash, stocks, bonds, commodities, retirement assets and more). You may be able to deduct a significant part of your gift immediately and part of the annuity payments you receive may be tax-free.

A deferred annuity can increase the annuity payments. Charitable Annuity Trusts offer additional flexibility depending on your needs.

*For a personalized illustration that demonstrates how a Charitable Gift Annuity might benefit you, contact our office.*



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## We Give to Support Life-Changing Work



Jay and Rhoda Oberholtzer have a long history with WellSpan Philhaven, which Jay calls a “five-star organization.” He should know - he served on the board of directors for 12 years, including time as board chair.

The Oberholtzers have also seen the importance of WellSpan’s life-changing work over many years in the lives of people in the community. “We are so fortunate to have this amazing resource that not only impacts clients, but also their family, their classmates, work colleagues and members of their congregation and community,” says Jay.

When Jay was on the board and also owner in their family business, the SKH chain of family markets, he and his wife were inspired to support WellSpan Philhaven by setting up a charitable gift annuity. In retirement it provides them with monthly income and eventually will benefit WellSpan Philhaven.

## Ready to Impact the Health of our Community?



### Refresh

your will or other estate plan to document your philanthropic wishes.



### Review

beneficiary designations of your retirement plans and life insurance.



### Recycle

assets by donating appreciated stock and buying the same stock with a new cost basis to avoid capital gains taxes and expand your giving potential.

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## I Give to Help People in the Grips of Mental Illness

WellSpan Philhaven is “close to home” in many ways for Beth Bostwick. Many years ago, Beth’s aunt was diagnosed with Schizophrenia as a young adult, and it was only at WellSpan Philhaven that her aunt realized she needed help. Until Beth’s aunt died recently, she was thriving at a special group home. Beth credits WellSpan Philhaven with giving her aunt the vital care she needed to have a better life.

Beth, who in the past, enjoyed serving WellSpan Philhaven in marketing and communications, has made a planned gift as a sign of thanks for the past and hope for the future. “As a way to show the deep gratitude I feel in my heart, my husband Bernie and I have included WellSpan Philhaven in our legacy plan and have become part of the WellSpan Philhaven Legacy Circle. We desire to be part of the sustainability of this amazing organization so that more individuals and families can find hope, healing and wholeness—the way mine did,” she says.



# Information for Your Professional Advisors

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Thank you for helping your client make a gift to WellSpan Philhaven.

Our office is available to assist you and your client in achieving your client's philanthropic goals. We are happy to meet in person, provide sample language for making a bequest to WellSpan Philhaven and create a variety of gift illustrations.

WellSpan Philhaven is a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code of 1986, for which a donor is or will be entitled to charitable contribution deductions per IRS guidelines. Donors to WellSpan Philhaven are encouraged to consult their own professional advisors regarding the deductibility of their gifts.

**Legal Name:** Philhaven

**Federal Tax ID:** 23-1548822

**Address:** WellSpan Philhaven  
P.O. Box 550  
283 S. Butler Road  
Mt. Gretna, PA 17064

## Bequest Language

I give Philhaven, a non-profit behavioral health care hospital, located in Lebanon County, PA the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my estate or asset) used for its general support (or for the following purpose: \_\_\_\_\_).

Please contact the WellSpan Philhaven Development Office regarding language for contingent, residual or other gift language including language for any restricted gifts or for questions about charitable giving strategies.

**WellSpan Philhaven  
Development Office**

**(717) 270-2407**

**[www.philhavenlegacy.org](http://www.philhavenlegacy.org)**





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